Budget Office JDF Review and Submission Job Aid

Who should complete the Justification Documentation Form (JDF)?

The Justification Documentation Form is a tool for describing a budget request and presenting the rationale and supporting evidence behind it.

OSBM recommends that budget office's delegate the JDF to staff who are most familiar with the program or policy related to the budget request. Program staff are usually in the best position to complete the JDF—especially the questions related to outputs, outcomes, and evidence—and this division of labor will reduce the burden on budget staff.

A JDF Completion Guide is available to guide staff through the process of filling out each JDF.

Role of the Budget Office

Agency budget staff should examine all form fields for completeness and accuracy. During the review, the budget office should coordinate with those completing the form to ensure it clearly explains to decision-makers the specific activities that will be funded, how and why the agency believes it will improve outcomes, and the plan for evaluating success.

Completing a thorough review prior to submitting draft and final JDFs will reduce the back-and-forth between OSBM and the agency. The goal is to make the strongest possible case for each of the requests.

Submitting the JDFs

Please send draft JDFs for all FY 2027-29 requests to your OSBM Budget Development Analyst by **December 1st, 2026**; operational ABC lists are no longer required.

After discussing draft JDFs with your OSBM analyst, submit final Worksheet II forms with updated JDFs in IBIS by **January 11th, 2027**.

JDF Review Checklist

Please use the following checklist to review your agency's JDFs before submitting them to OSBM.

☐ Are all questions completed?

☐ Are all responses entered within the form fields?
Do not modify the document outside of the form fields. Link or separately attach supplemental documentation as needed (e.g., detailed cost analyses, reports, research papers).

☐ Question 7: Is the amount of funding and FTE requested accurate?
Enter only numbers here; provide detailed explanations in Question 16.

☐ Question 11: Is the problem or opportunity clearly explained, with supporting information about its scope and severity? Is it evident how the input activities, if funded, address the underlying causes of the problem?

☐ Question 13: Push back against the tendency to focus only on the outputs of funded activities (e.g., permits approved, people served, buildings inspected). Check, does Question 13 identify the deeper *reason* for doing this work – what meaningful improvements is the agency trying to achieve in terms of *outcomes* (e.g. a 10% improvement in surveyed customer satisfaction, 15% fewer incidents of lead poisoning)?

☐ Questions 15 and 16: If Proven Effective, Promising, Mixed Effects, No Effect, of Proven Harmful is selected in Question 12, are the methods and findings from at least one research paper linked or attached and described?

☐ Questions 15 and 18: If Theory-based, Mixed Effects, or Promising is selected in Question 15, is there an evaluation funding request in Question 18? Is the amount requested for evaluation identified?

If the agency needs additional resources (funds, staffing, external partnerships) to evaluate the implementation and effectiveness of the proposal, OSBM strongly encourages the agency to include a request for funding.

☐ Question 19: Are the assumptions, data, and methods used to arrive at the cost estimate comprehensively outlined?

Ensure backup data and calculations are included or attached.

☐ Is OSBM consultation requested? Check contact info and expect someone from OSBM to reach out to the contacts provided in question 6.

Several of the questions in the JDF have an option to request consultation from OSBM. The subject experts completing the form should provide their contact information in Question 4. If consultation is requested, OSBM will include the budget office on all communications.

<u>Final Step After ALL JDF Reviews Are Complete</u>

☐ Enter the priority rank of the request in Question 4.

Coordinate with leadership to uniquely rank all budget requests at the agency (not Division) level. No two requests should have the same rank.